# Welcome

Proven history with IDD agencies

- Partnering with agencies for over 15 years
- Over 150 clients nationwide
- Presence in each region of USA
- Client-driven development roadmap
- Not one-size-fits-all

IDD-specific design

Client-centric partnerships

Custom approach
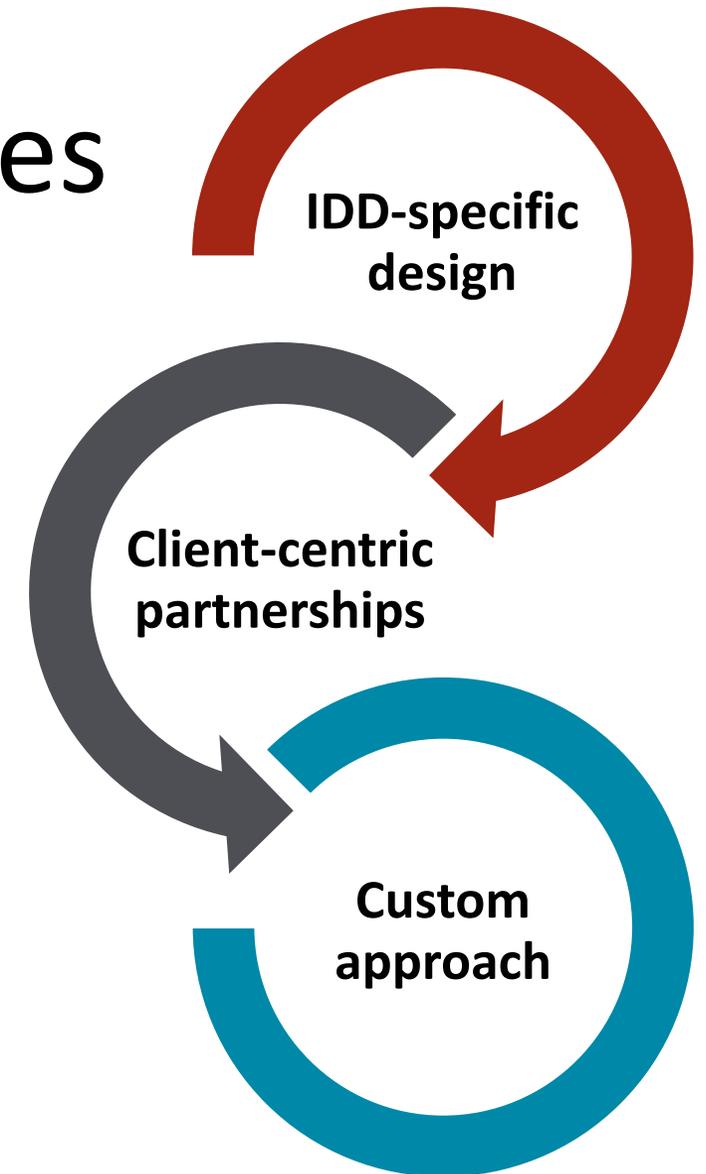
- Cloud-based solution
- Accessible anywhere with Internet access
- Usable on any device
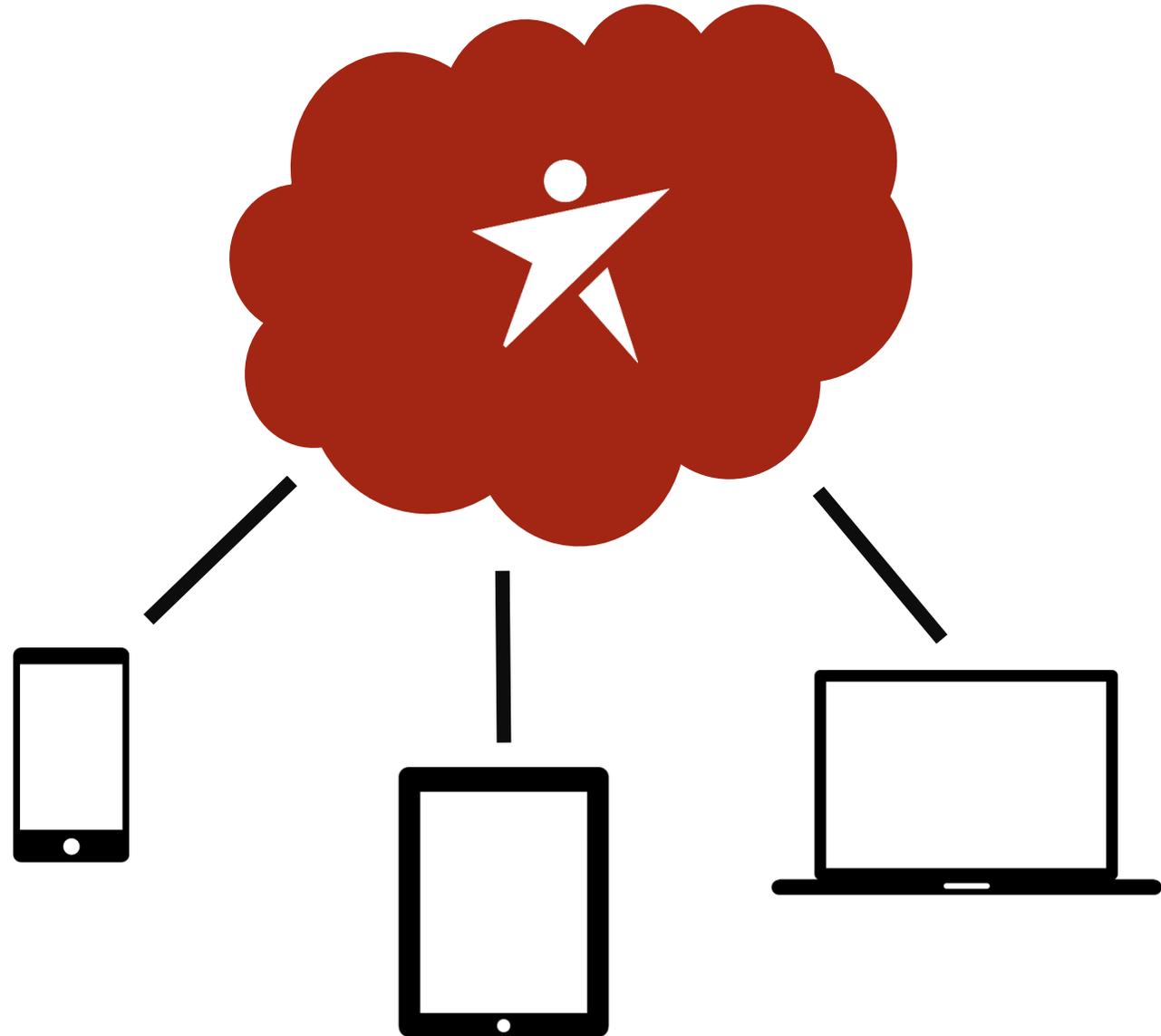
User-friendly and intuitive for all IDD services

Employment Services

Mental Health

Day Programs

Providers & Case Management

Transportation

Residential/ Community Living

Community Services

Supports services with some similar documentation needs

Behavioral Health/Mental Health

IDD

Other

Substance Abuse
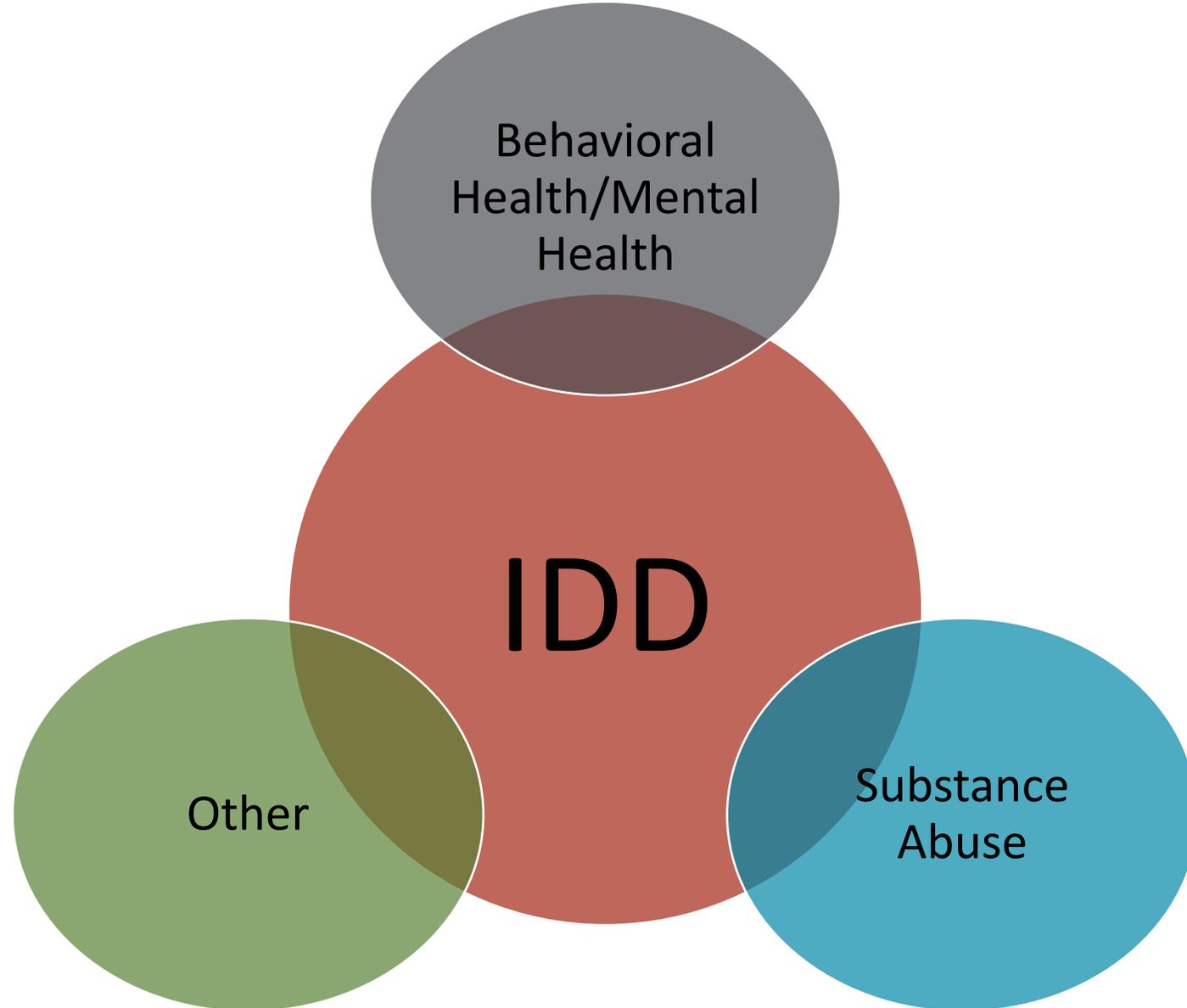
Fully-integrated system

- Organizational efficiencies
- Streamlined processes
- Increased compliance
- Actionable data at fingertips

Scheduling

Client Records & Service Delivery

HR/Training

Quality Assurance

Reporting/ Business Intelligence

Billing

Timekeeping
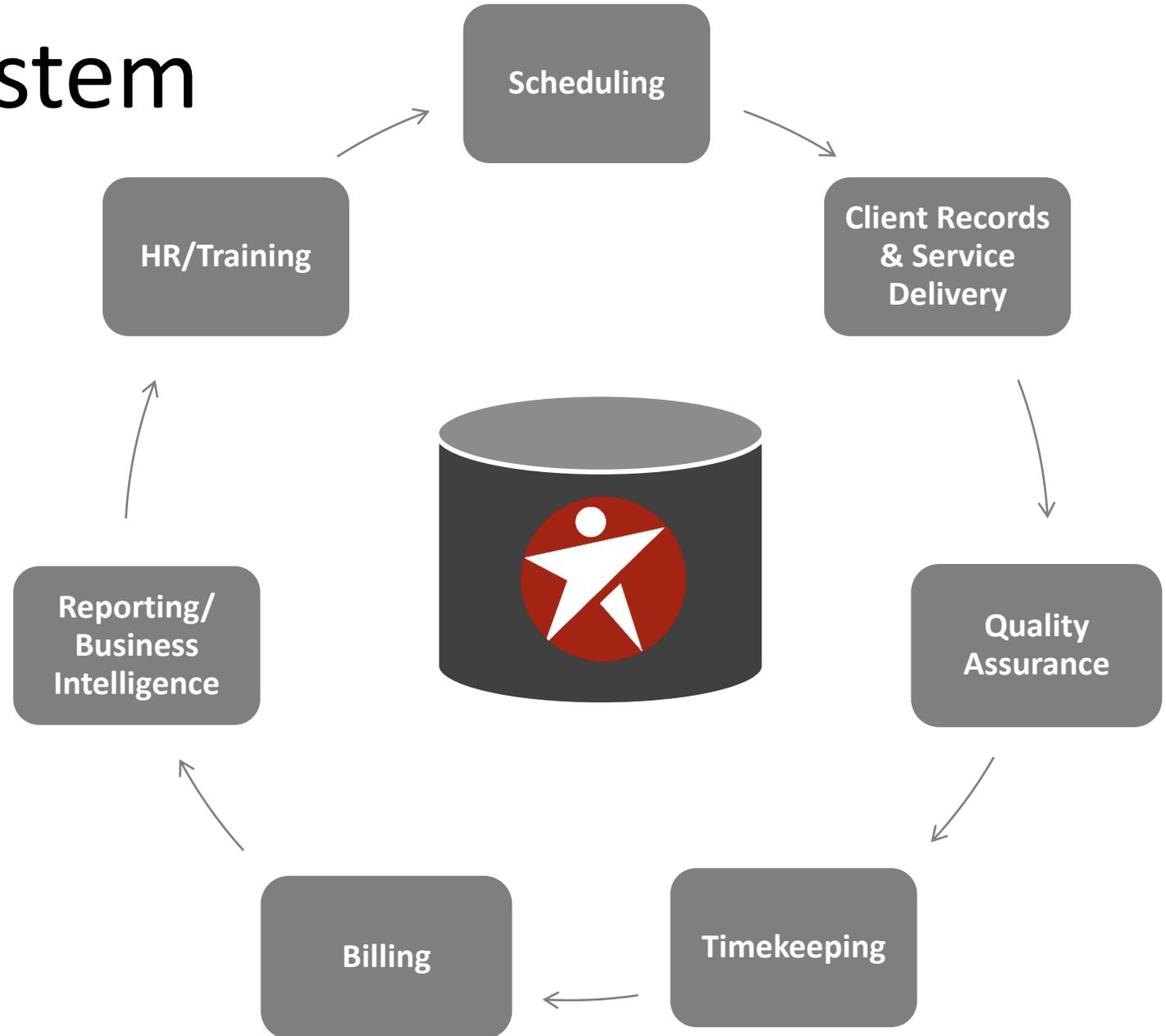
# EVV included

Desktop	Mobile

Full EVV compliance +
powerful service documentation

SETWorks Platform

# 3rd party system integration
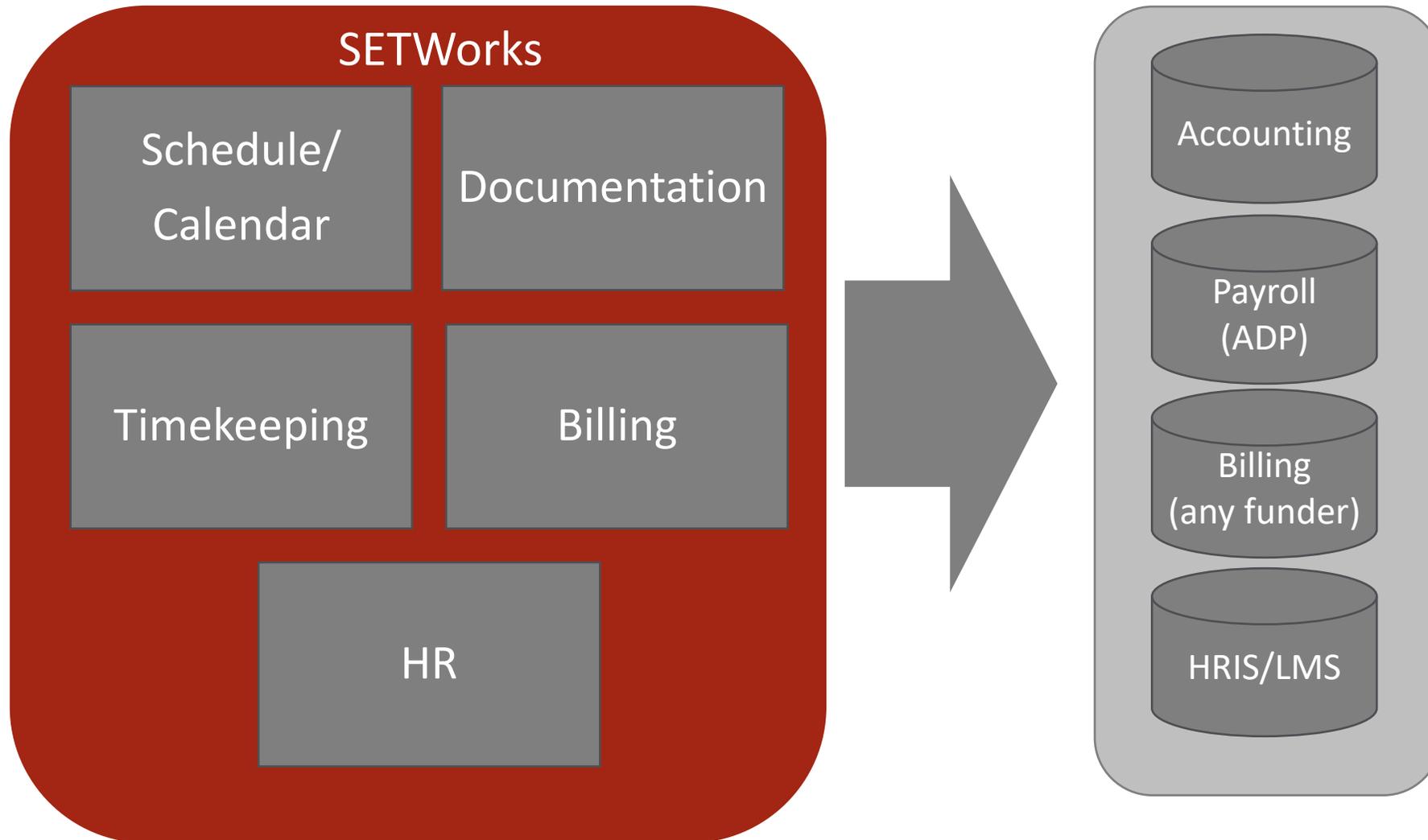
Integrated Business Intelligence

- Customizable Dashboards & Visualizations

- Aggregate any data element

- Reporting for Boards, Funders, Auditors, Accreditations

Best-practice Implementations

- Workflow analysis
- Flexible
- Prioritized customizations

Value add

Outcomes Management

3rd party Integrations

Core activities
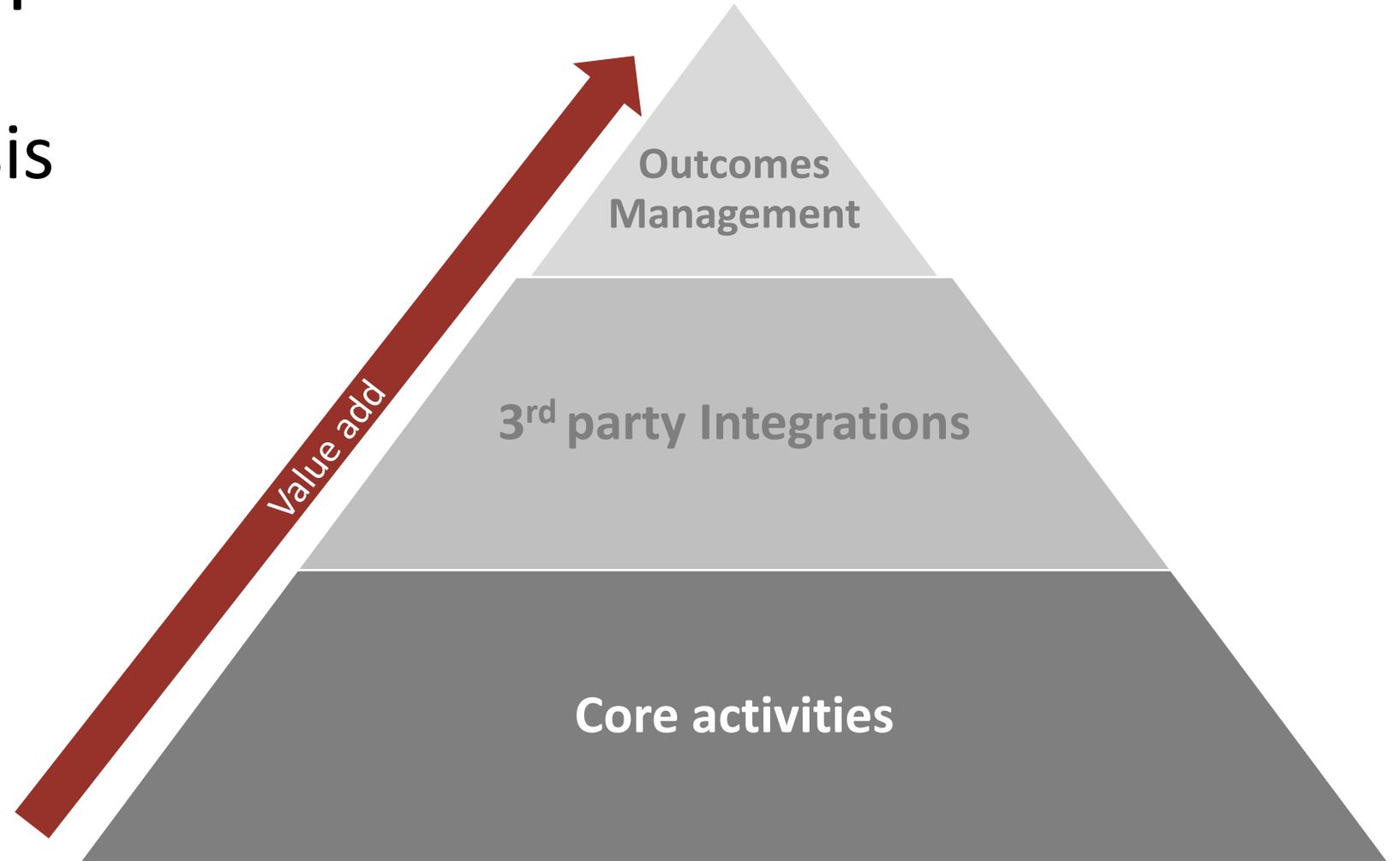
Securely delivered

- Enterprise-grade HIPAA compliant 256-bit SSL security

- SOC Compliance

- 24x7x365 system monitoring

- Minute-by-minute backups

- Stringent and configurable password requirements

- Access configurable by IP address

- Two-Factor Authentication (TFA) available

- Independent third-party security audits
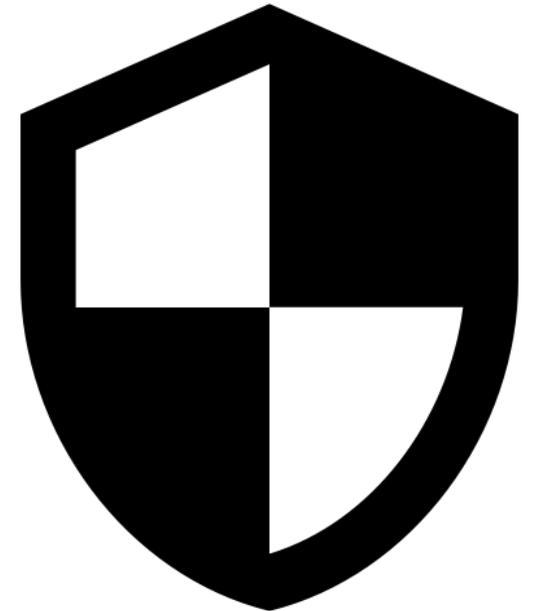
Integrated process for manual and electronic billing

- Import data from funder/state systems

- Interface to accounting systems

- Reporting
  - Pre/Post Billing Reports
  - RA/Healthcare Payment Batch Report
  - Aging Report
  - Invoice Billing Report
  - Custom Billing Reports

- Business Intelligence
  - Finance Dashboard

Case notes

Authorization data

Client Time & attendance

Billing output
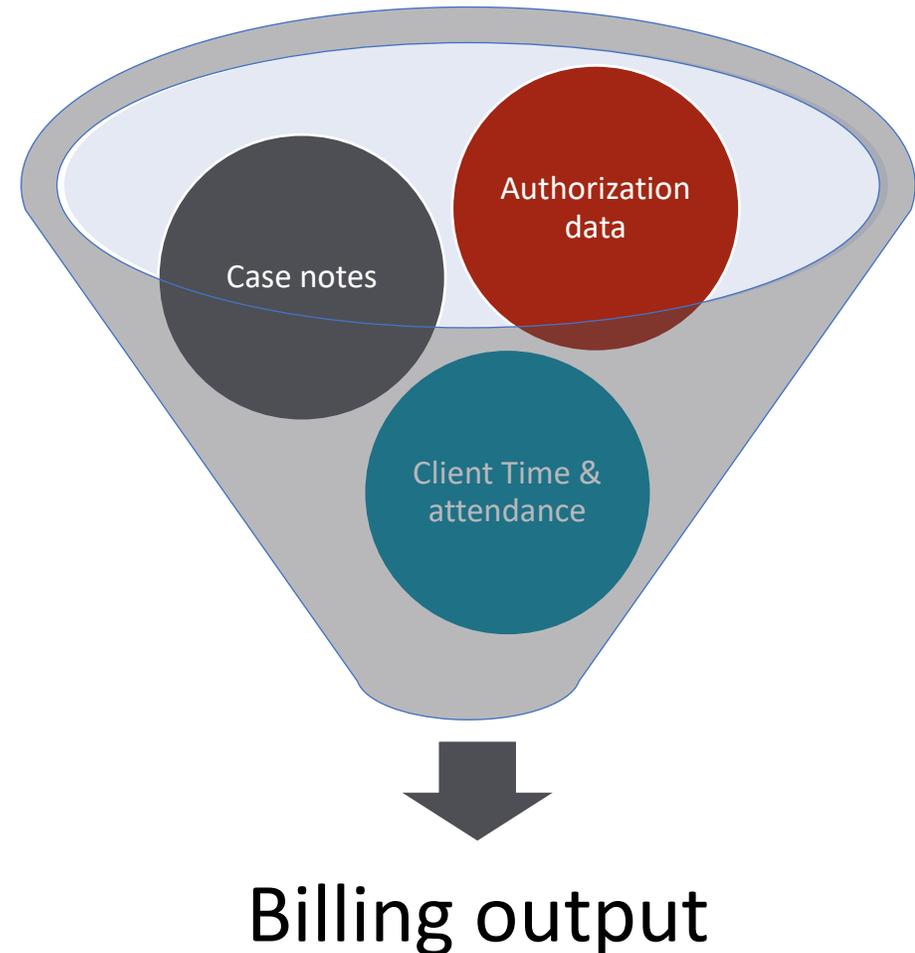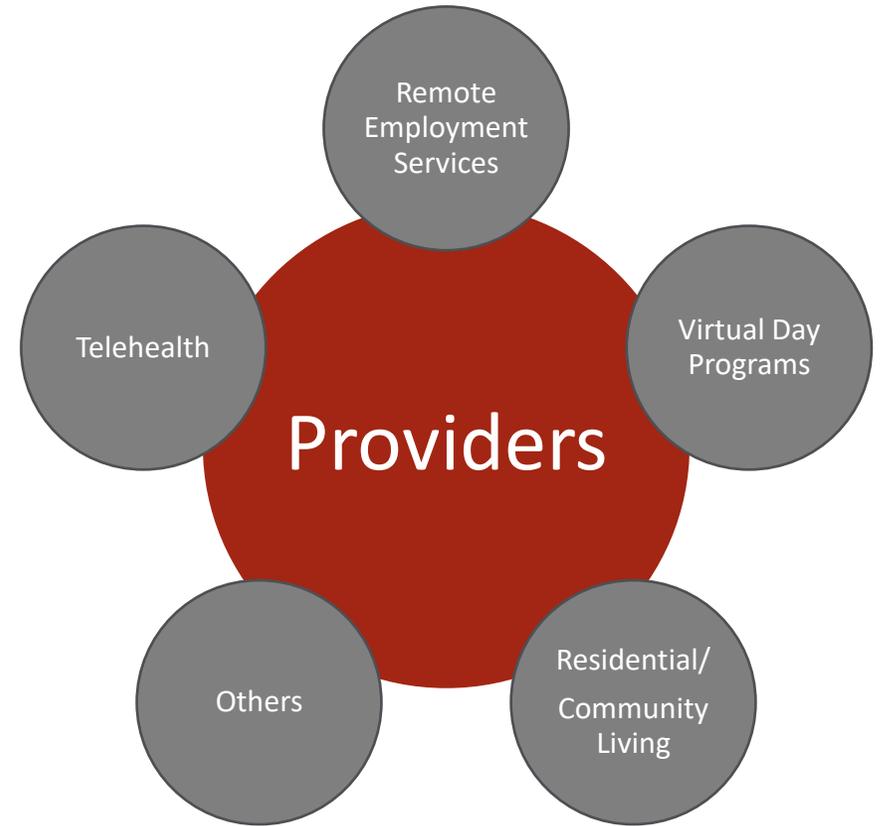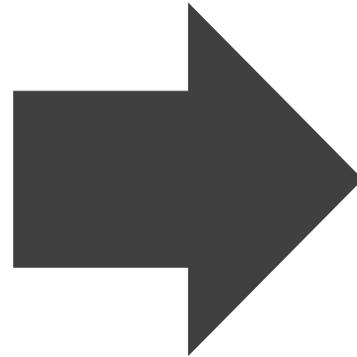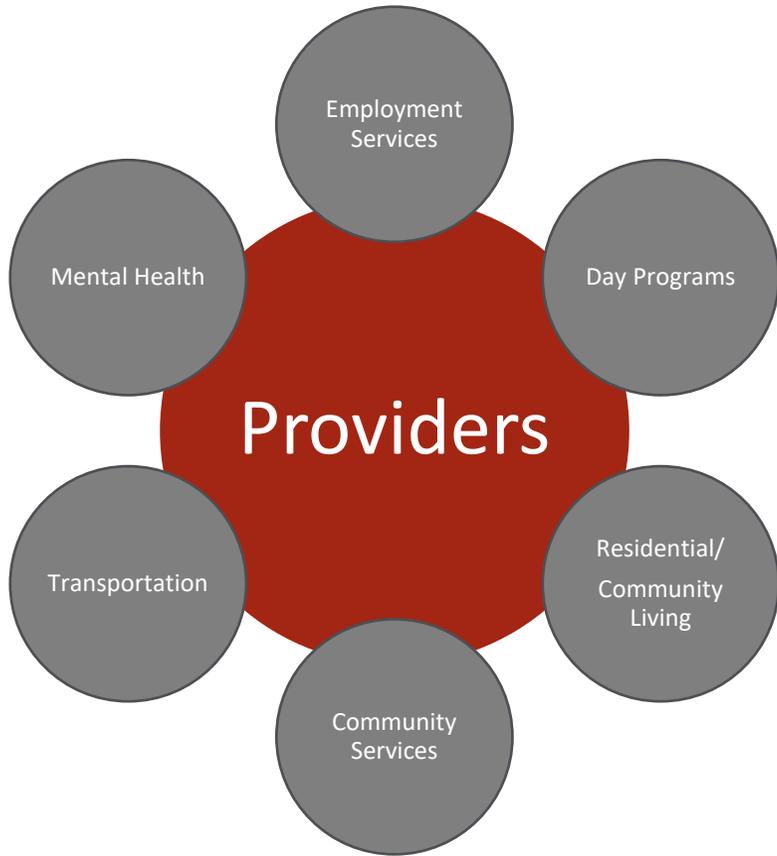
COVID-19 Impact

(Mostly) In-Person

(Mostly) Virtual

COVID-19 Impact

Client Hours
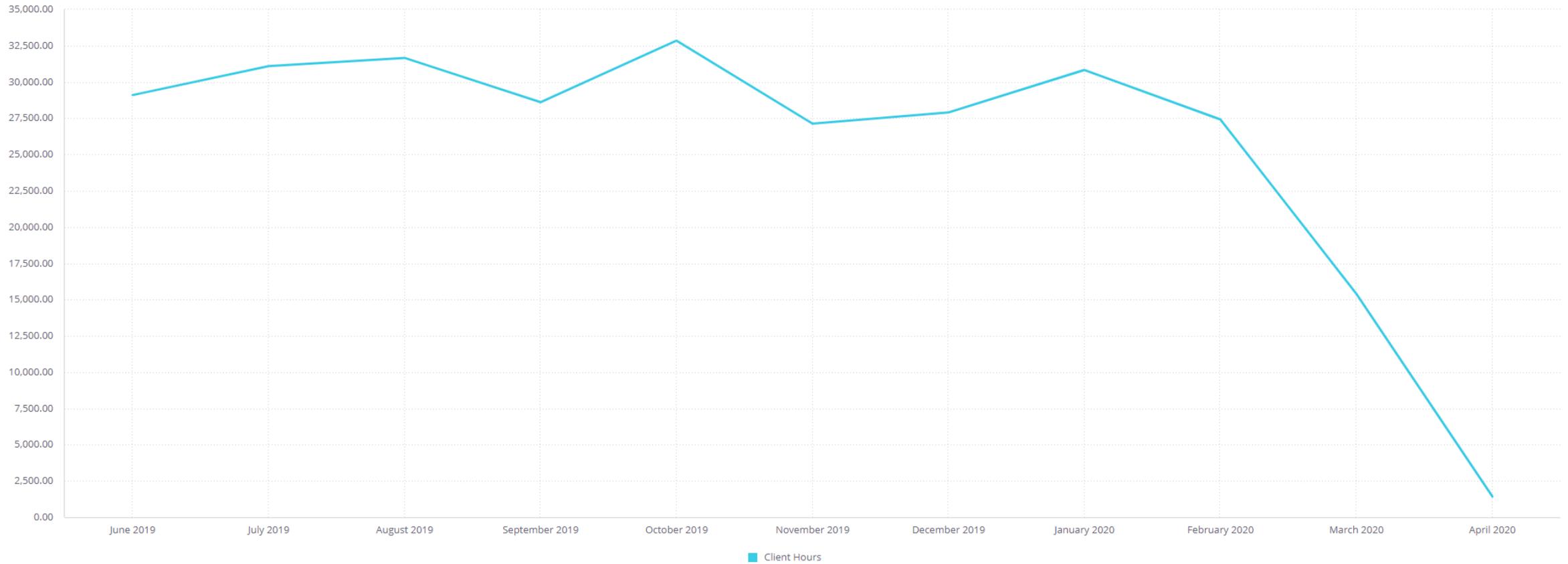
COVID-19 Employment Services impact
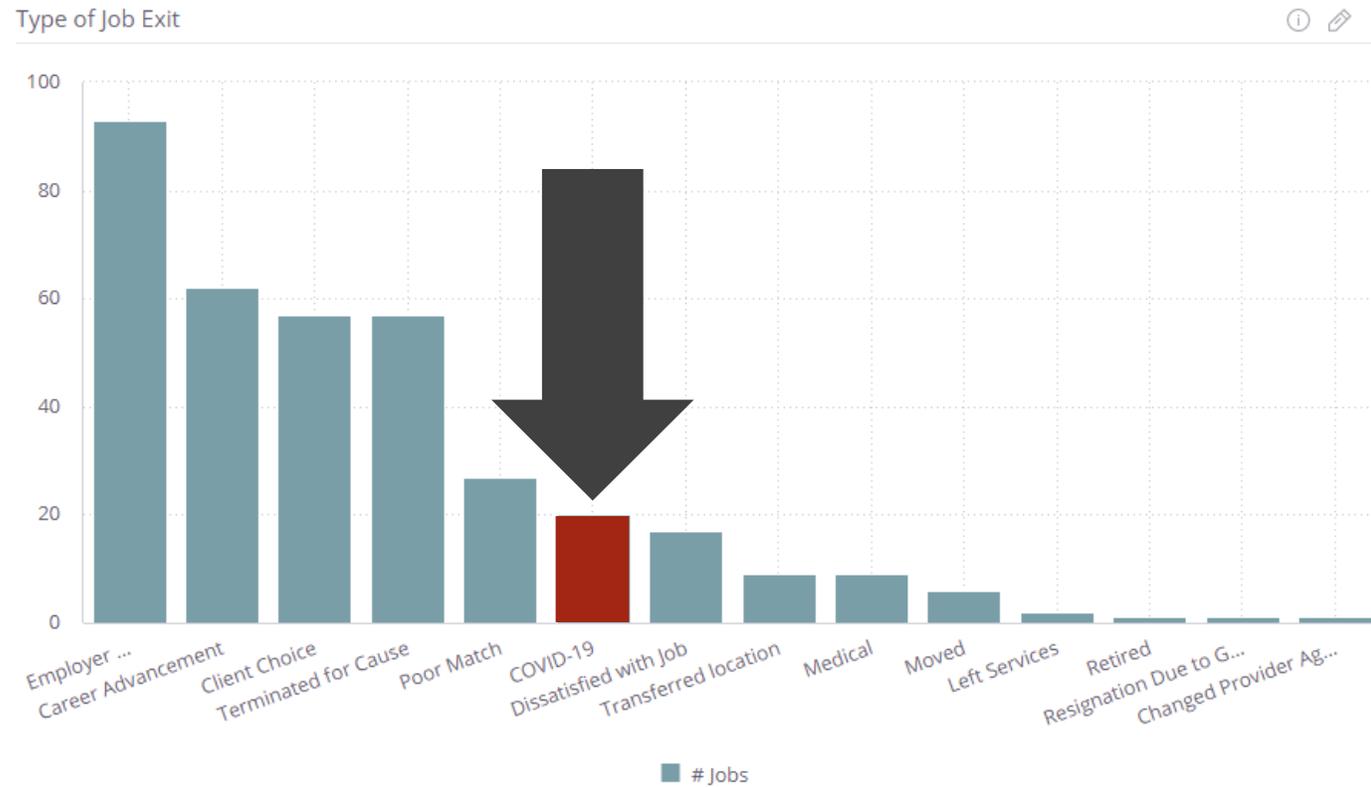
COVID-19 tools: CI drop to zero, Employment hit
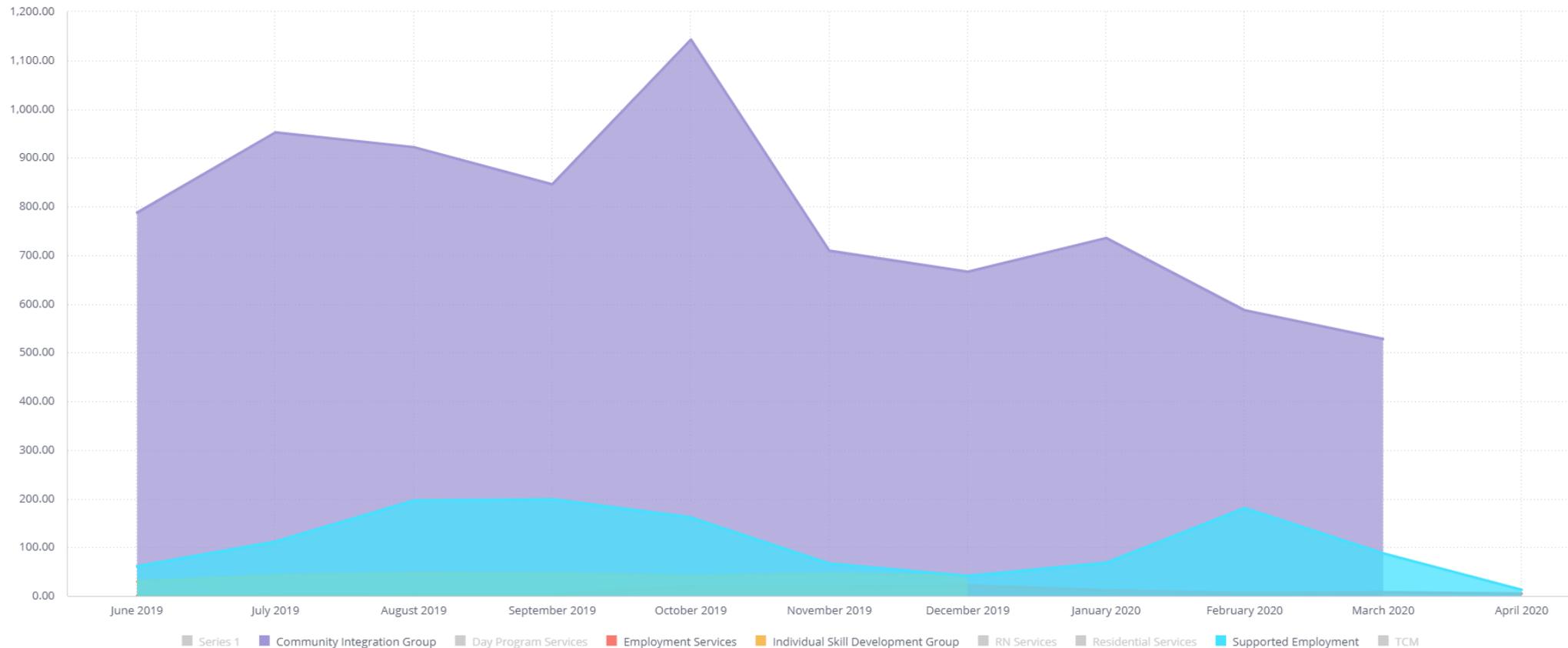
COVID-19 tools: Day program drop & provided virtually

Legend: Series 1 · Community Integration Group · Day Program Services · Employment Services · Individual Skill Development Group · RN Services · Residential Services · Supported Employment · TCM
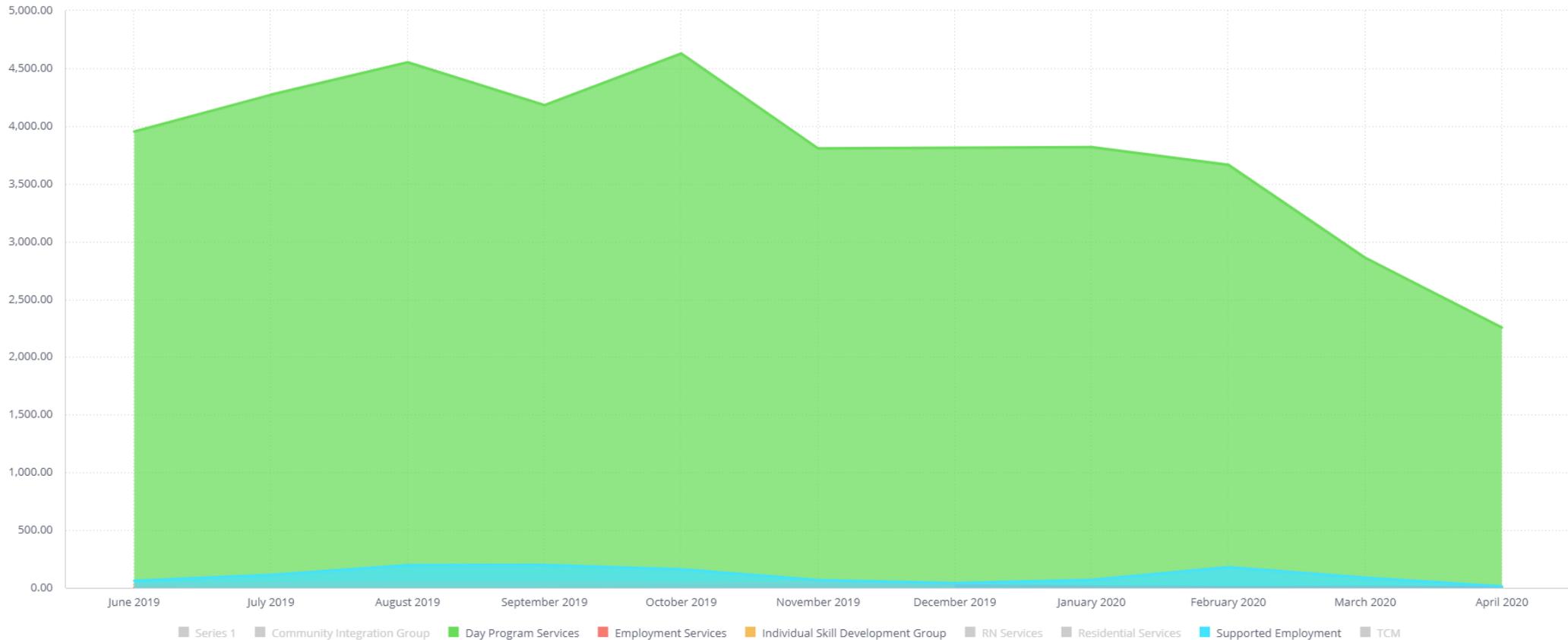
COVID-19 tools: Residential uptick
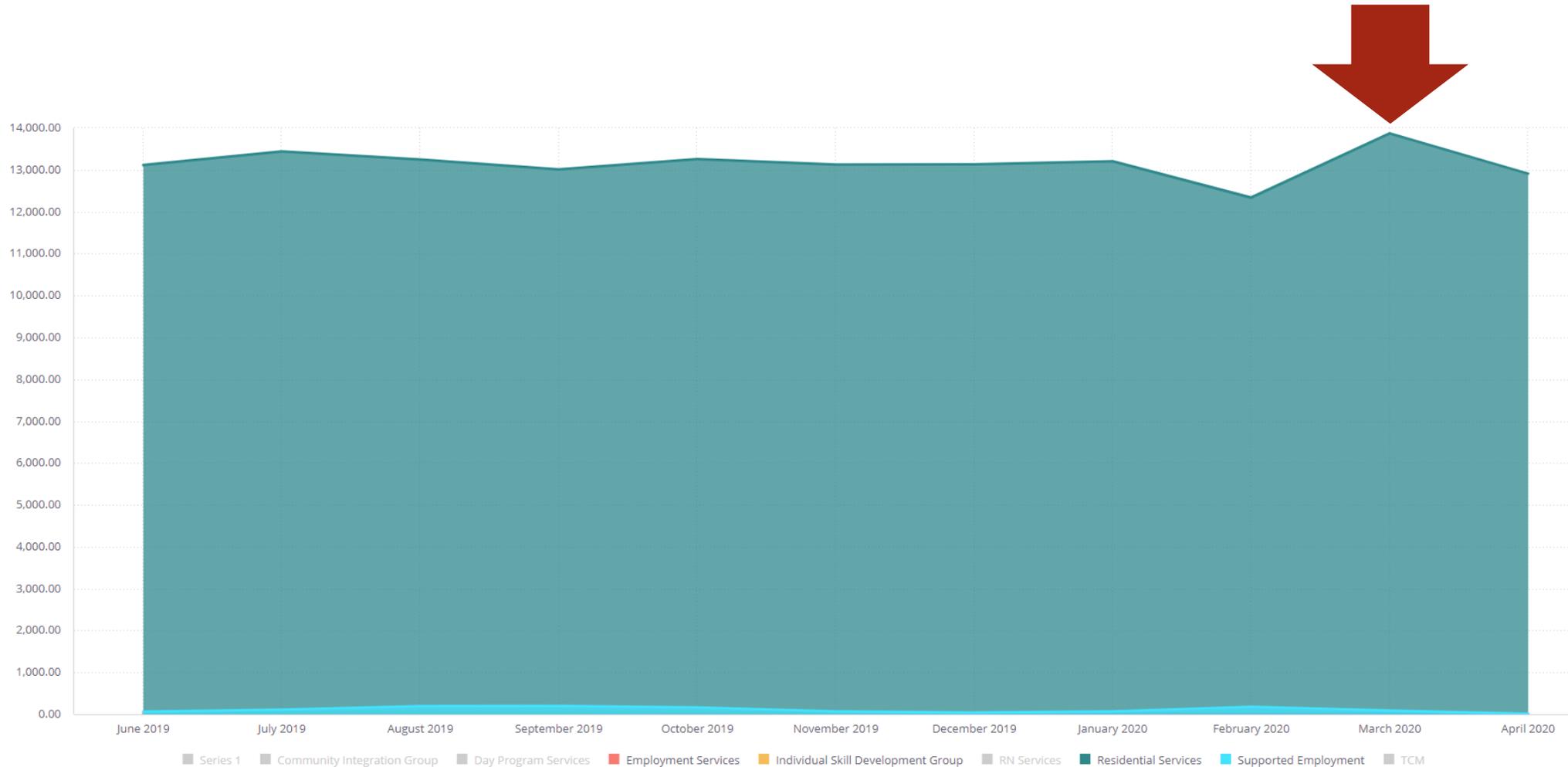
COVID-19 Response at Agency and State Level

- Client Success Team- assist with new best practices, other requests
- Development Team – new reporting and documentation needs

Team

- New billing rules
- Service definitions
- Documentation requirements

Configuration Tools

- Track temperature
- COVID-19 staff guides
- Symptom checkers/screenings

Forms

Reports

Actionable data to quickly assess impact
- Drop in service hours
- Staff changes
- State reports for judging agency impact

COVID-19 Response - Forms

Forms:

- COVID-19 Cleaning Tracker

- COVID-19 Staff Temperature and Hand Washing

- COVID-19 Staff Guides

- COVID-19 Home Guides

- COVID-19 Questionnaire Forms

- COVID-19 Screenings

- COVID-19 Shift Symptom Checks

- Etc.

Priority forms are capable of automatically notifying specified distribution lists.

All incoming staff arriving on shift will need to have their temperature taken, verify they are feeling okay, free of any symptoms and wash their hands prior to starting their shift. The following steps detail this process:

1. Outgoing staff will take the incoming staff's temperature prior to starting their shift and ask staff if they are feeling okay.

2. *If the temperature exceeds 100 degrees, or the staff has any symptoms (cough, shortness of breath, lack of taste or smell or redness in eyes), the staff with the elevated temperature or symptoms needs to go to their vehicle and await further instruction

3. The staff taking the temperature will then contact nursing on call to elevate the information.

4. Nursing staff will then contact the staff to ask further questions either clearing them to work or sending them home.

5. If staff are not allowed to work, they must get clearance from their doctor before returning to work.

6. Nursing staff will then elevate their findings to Program on call to ensure the needed follow up takes place.

7. If staff are cleared to work they need to thoroughly wash their hands prior to starting their shift.

Date:
04/29/2020

Time:

8:00 AM

Name of staff arriving on shift:

John Smith

Staff's temperature:

98.60

* Staff is symptom free?

COVID-19 tools

| Client Name	ADSA	Service	Monthly Limit (hours)	Oct 2019		Nov 2019		Dec 2019		Jan 2020		Feb 2020		Total	Average
				Total	Average	Total	Average	Total	Average	Total	Average	Total	Average		
Adair, Newton	85472385							1.00	1.00	0.08	0.08	1.00	1.00	2.08	0.69
		Case Closure (UNIT TEST)		1.00	1.00									1.00	1.00
		Children Services - Early E...		0.00	0.00	1.00	1.00	0.25	0.25	1.50	1.50	2.00	2.00	4.75	0.95
		Day Program		2.00	2.00	6.00	6.00	6.50	6.50	24.00	24.00	26.00	26.00	64.50	12.90
		Documentation								0.08	0.08			0.08	0.08
		Residential	10	41.00	41.00	45.50	45.50	49.00	49.00	31.00	31.00	28.00	28.00	194.50	38.90
		Speech Therapy	80	29.00	29.00	42.52	42.52	27.00	27.00					98.52	32.84
		Supported Employment		8.00	8.00	12.00	12.00	7.50	7.50	8.00	8.00	10.00	10.00	45.50	9.10
Adair, Newton Total				81.00	81.00	107.02	107.02	91.25	91.25	64.67	64.67	67.00	67.00	410.93	82.19
Adams, John		CPS 25% - 49% - CPS Facili...						4.00	4.00	1.00	1.00			5.00	2.50
		Residential		46.00	46.00	45.50	45.50	43.00	43.00	21.25	21.25	24.00	24.00	179.75	35.95
Adams, John Total				46.00	46.00	45.50	45.50	47.00	47.00	22.25	22.25	24.00	24.00	184.75	36.95
Alderman, Mark	2342625	Day Program						14.00	14.00	29.00	29.00	25.02	25.02	68.02	22.67
		Off-Site Individual		0.00	0.00			2.00	2.00					2.00	1.00
		Residential		40.00	40.00	27.50	27.50	16.00	16.00	14.00	14.00			97.50	24.38
Alderman, Mark Total				40.00	40.00	27.50	27.50	32.00	32.00	43.00	43.00	25.02	25.02	167.52	33.50
Allaby, Miranda		Day Service min 16 hours						11.00	11.00	2.00	2.00			13.00	6.50
		Speech Therapy						5.75	5.75					5.75	5.75
Allaby, Miranda Total				0	0	0	0	16.75	16.75	2.00	2.00	0	0	18.75	9.38
Asher, Jane		Day Program		25.00	25.00	48.00	48.00							73.00	36.50

COVID-19 tools
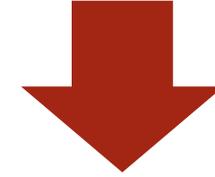
| Consumer	Staff	Funding Source	Department	Service	Billing Code	Auth Code	Service Type	Face-to-Face	Phase	Travel Time (hours)	Service Hours
Asher, Jane	Koelling, Mathew	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	1
Asher, Jane	Cooper, Laura	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	6
Asher, Jane	Cooper, Laura	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	6
Asher, Jane	Cooper, Laura	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	2
Asher, Jane	Cooper, Laura	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	2
Asher, Jane	Cooper, Laura	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	6
Asher, Jane	Lindell, David	IVRS	Sales Demo Department	Day Program	T2021SE	T2021SE	Day Program	Yes		0	1
Harrison, Zac...	Missihoun, Mariah	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.5
Harrison, Zac...	Missihoun, Mariah	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.25
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.25
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.25
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P1Intak...	0	2
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	0.25
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P4Reco...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	No	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	1
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	0.5
Harrison, Zac...	Jacobsen, Marina	Supported Empl...	Kitsap County	Kitsap-Supported Em...		1121211	*Individualized Su...	Yes	P1Intak...	0	0.5
Adams, John	Enz-Cusanelli, Hannah	Supported Empl...	Clark County	Clark-Supported Empl...		11111	*Individualized Su...	No	P4Reco...	0	0.05
Adams, John	Jaimes , Jimmie	Supported Empl...	Clark County	Clark-Supported Empl...		11111	*Individualized Su...	No	P4Reco...	0	1

COVID-19 tools

Full Name	Service	Auth ID	Start Date	End Date	Total Hours	Hours Used	Hours Remaining	% Hours Utilized	% Ideal Utilized	Utilization Shortfall %	Auth days left	% Time left
	IE PIERCE	490410	2/1/19	12/31/19	276	225.75	50.25	81.79%	100%	-18.21%	0	0.00%
		613658	1/1/20	12/31/20	456	50.25	405.75	11.02%	21.37%	-10.4%	287	21.48%
	DVR ITS	594123	10/24/19	4/21/20	1,000	32.5	967.5	3.25%	31.67%	-28.42%	123	37.75%
	DVR JP	584630	9/12/19	3/10/20	1,000	26	974	2.60%	23.33%	-20.7%	138	42.36%
	IE KING	581846	9/1/19	8/31/20	276	119.75	156.25	43.39%	54.79%	-11.41%	165	12.35%
	S2W KING	592692	10/18/19	6/30/20	730,000	33.75	729,966.25	0%	60.2%	-60.2%	102	15.50%
	IE PIERCE	583903	9/10/19	8/31/20	84	29.75	54.25	35.42%	53.65%	-18.24%	165	12.98%
	IE KING	514685	3/1/19	2/29/20	192	87.25	104.75	45.44%	99.73%	-54.28%	1	0.07%
		632117	3/1/20	2/28/21	144	2.25	141.75	1.56%	5.22%	-3.66%	345	25.97%
	IE KING	544068	5/1/19	4/30/20	144	49.25	94.75	34.20%	87.95%	-53.74%	44	3.29%
	IE KING	574536	8/1/19	7/31/20	144	42.75	101.25	29.69%	63.56%	-33.87%	133	9.96%
	IE PIERCE	609245	1/1/20	12/31/20	192	17.25	174.75	8.98%	21.64%	-12.66%	286	21.41%
	IE PIERCE	527444	3/1/19	7/31/20	144	151	-7	104.86%	74.32%	30.5%	133	4.95%
	IE KING	561322	8/1/19	5/31/20	312	36.5	275.5	11.70%	75.66%	-63.96%	74	7.98%
	Private Pay King	609905	12/2/19	12/1/20	12	4	8	33.33%	27.12%	6.21%	266	19.91%
	IE KING	515177	3/1/19	2/28/20	168	98.75	69.25	58.78%	100%	-41.22%	0	0.00%
		634399	2/29/20	2/28/21	168	5.75	162.25	3.42%	5.48%	-2.06%	345	25.83%
	IE PIERCE	596780	11/1/19	10/31/20	288	83	205	28.82%	38.08%	-9.26%	226	16.92%
	DVR ITS	546336	5/22/19	7/22/19	65	161.75	-96.75	248.85%	100%	148.85%	0	0.00%
	IE PIERCE	596790	11/1/19	10/31/20	192	33.75	158.25	17.58%	32.33%	-14.75%	247	18.49%
	IE PIERCE	583942	9/7/19	11/5/19	46	50.25	-4.25	109.24%	100%	9.24%	0	0.00%
		596785	11/6/19	10/31/20	276	101.5	174.5	36.78%	37.50%	-1%	225	17.31%
	DVR JP	556902	6/18/19	11/18/19	250	20.5	229.5	8.20%	35.95%	-27.75%	98	41.59%
	CI King	514912	2/15/19	11/30/19	180	93.25	86.75	51.81%	98.96%	-47.15%	3	0.36%
		607231	12/1/19	11/30/20	180	39.25	140.75	21.81%	29.59%	-7.78%	257	19.24%

COVID-19 tools
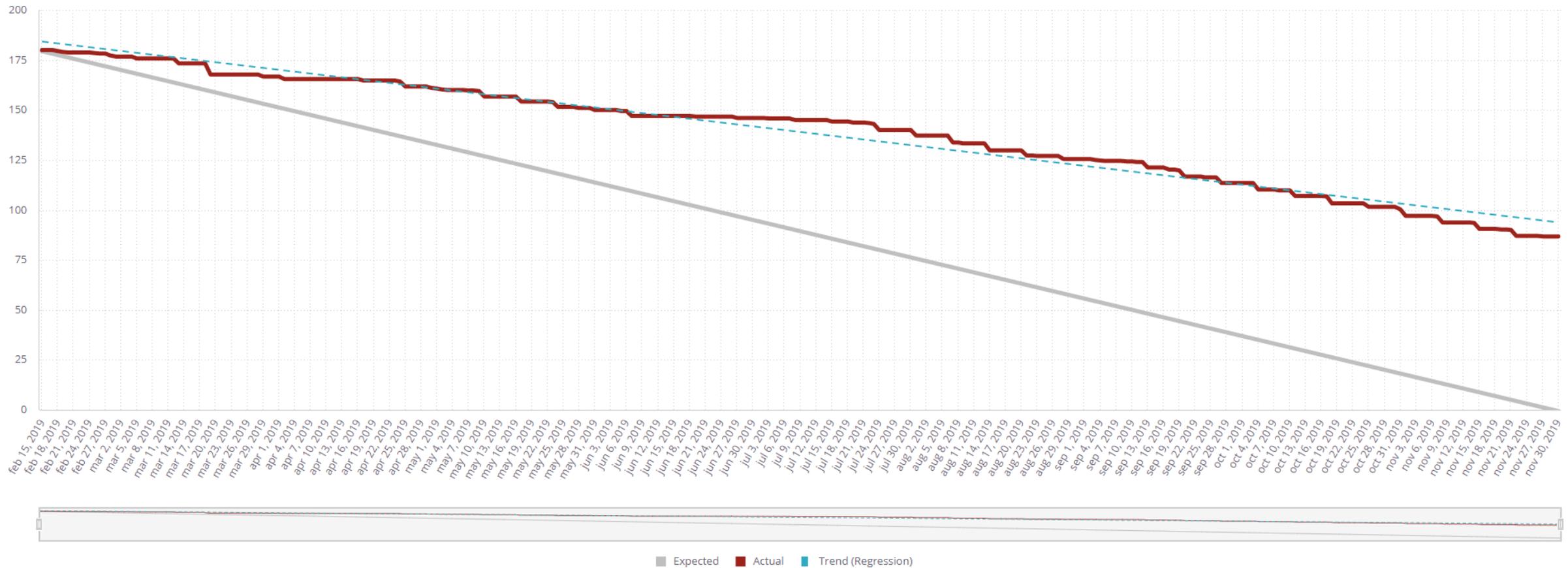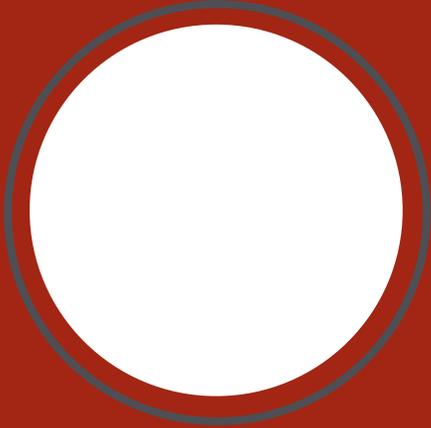
Q&A

For additional information contact

Laura Cooper - 816.674.7668

lcooper@setworks.com